EXPORT IMPACT
FOR GOOD

Market Insider

ESSENTIAL OILS AND OLEORESINS
MARKET INSIDER

Field of young sage (*Salvia officinalis*) plants

July 2016 Report

Market Insider

Building awareness and assisting developing countries with access to trade and market information has been at the heart of the International Trade Centre (ITC) work. The Market Insider is a newly branded global public goods service built on a "blog" interface to provide just-in-time content on market prices and industry developments focusing on forward-looking intelligence in anticipation of market opportunities, market dynamics, quality issues, trade events and sector-specific intelligence on commodities of interest to developing countries.

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Development of integrated supply chain – mint

Demands for quality, traceability and the increasing sophistication of the flavours and fragrances industry is continuing to drive the development of integrated supply chains, from field to final formulation. Mint is one of the most important flavours, and 2 of the major players in this sector have recently moved their relationship to a more formal partnership. Firmenich have announced it has made a major investment in Essex Laboratories, one of the world's leading producers of natural mint essential oils.

With its core operations in the states of Washington and Oregon, US, Essex works with a global network of the best mint growers to offer the finest qualities and broadest range of mint worldwide. Its natural peppermint and spearmint essential oils, extracts, and tailored mint oils are broadly used across the food, confectionery, beverage, health, cosmetic and fragrance industries. "I am very excited about taking our excellence in mint to the next level with Essex Laboratories", said Gilbert Ghostine, CEO of Firmenich. "Together we will offer our customers the world's finest mint from field to shelf, as well as, the ability to create tailored, game-changing solutions with the most traceable and sustainable value chain."

"By joining the Firmenich Group, with its cutting edge commitment to Research and Naturals, we will take our innovation to the next level," commented Mark Morlan, Founding Member and CEO of Essex Laboratories. "Our goal is to offer our customers the most outstanding and differentiated products made from the finest quality mint oils with the best flavor profiles."

"We are seeing increasing demand for natural mint tonalities in oral care, beverages and sweet goods applications," said Cedric Fischer, Vice President Oral Care and Mint Unit. "Firmenich's industry-leading expertise, combined with Essex Laboratories' unique natural breeding program, will enable us to craft tailored flavors and fragrances from these essential oils to meet our customers' specific needs. Through this joint venture we will be offering our Flavors and Perfumery customers the broadest mint portfolio of the industry that is both sustainable and cost-effective. Furthermore we will be able to design bespoke essential oils, flavors and fragrances building on Essex's unique natural breeding program. Mint exists from ancient times and will continue to please consumers thanks to its specific taste profile and refreshing sensation. Having the ability to tailor-made new mint profiles will allow Firmenich to meet future market requirements. Through this JV we will be able to produce more sustainable mint varieties, a greater diversity of taste profiles to address today's standard mint limitations and tackle potential future limitations by designing tailored oils with new formulas."

Through this joint venture Firmenich will offer the richest mint portfolio in the industry with an unparalleled global sourcing capacity, while ensuring a traceable and sustainable value chain. As a leader in the global mint industry, Essex Laboratories is renowned for supplying customers with the highest quality Mint essential oils and extracts supported by superior technical service and innovation. For more than two decades, Essex Laboratories has built strong grower relationships with a diverse producer base around the globe to guarantee the finest quality mint at the farm level, as well as a stable, year round supply.

Source: Firmenich

Essential oil symposium

The 47th International Symposium on Essential Oils (47th ISEO) will be held in Nice, France, on September 11-14, 2016. This Symposium will gather academic and industrial scientists for a review and discussion of the latest research findings and evolving ideas regarding the essential oils and volatiles. With the vicinity of the region of Grasse, which has the highest concentration of Flavour & Fragrance industries in France, there will be plenty of opportunities to create interactions between academic researchers and industrial scientists working on these fascinating fields.

UEBT Responding to rules on biodiversity-based innovation

A summary of the presentation at the recent conference:
Cécile Pelletier, R&D Legal Counsel at Nestlé, focused her presentation on the ABS compliance tool developed in the context of Nestlé research and development activities. This ABS tool applies to fundamental research and product development – but it is important to note that R&D activities vary greatly from new products to new equipment and safety. On the basis of EU regulation, the ABS compliance tool identifies ABS-related risks in R&D projects and ensures due diligence. It is a checklist with 13 questions relating to the genetic resource to be used and ensuring full traceability. Of course, some points remain challenging, including distinguishing genetic resources from commodities – which is particularly difficult in the food sector – and plain 'cooking' from R&D.

Vijendra Prakash, Senior Manager, Domestic Regulatory Affairs at The Himalaya Drug Company, discussed putting in practice ABS rules in the Indian Biodiversity Regulations. The company has a range of over 300 herbal-based health and personal care products. Since the 2014 adoption of the Indian guidelines on benefit sharing, the company has put in place an ABS mechanism for its supply chains. According to Indian Biodiversity Regulations, national companies need to notify their use of biodiversity to State Biodiversity Boards. This can be challenging as each of these boards has its own approach to benefit sharing. Another critical yet often difficult issue is framing ABS payments in the context of companies' on-going activities on ethical sourcing of natural ingredients and sustainable use of biodiversity.

Laurent Gilbert, Director of Advanced Research International Development at L'Oréal, explained how the company's ABS approach is embedded in its broader sourcing and sustainability strategies. The L'Oréal 'Sharing Beauty with All' program covers not only sourcing, producing and consuming sustainably: it is about living sustainably. In this context, biodiversity-based innovation is key as consumers want more and more natural products. By 2020, 100% of plant-based ingredients in L'Oréal products will be sustainably sourced, which includes respecting the principles of the CBD and the Nagoya Protocol. Any product innovation arising from biodiversity is thus subject to a four-step process that 1) establishes traceability; 2) ensures compliance with applicable laws and regulations, including rules on ABS; 3) addresses most critical sustainability issues along the supply chain; and 4) determines accountability. This is implemented in coordination with the purchase, legal, regulatory and quality teams.

Practical experiences with ABS:
The final session included concrete examples of how companies are navigating laws and regulations on ABS, as well as ABS principles in countries that have not enacted such rules. To set the scene, Valérie Normand, Senior Programme Officer on ABS at the CBD Secretariat, provided an update on the ratification and implementation of the Nagoya Protocol around the world. The Nagoya Protocol entered into force in 2014. The main challenge is now making the Nagoya Protocol operational, which involves adopting ABS laws and

regulations. Since 2014, 15 Nagoya Protocol Parties have adopted ABS measures. 27 Parties are revising their existing ABS measures. And approximately 29 Parties are planning to develop ABS measures.

Laurent Gilbert, L'Oréal, having shared the general approach to ABS in the company, explained that each case of ABS remains, nevertheless, quite specific. This is because each product is unique. In the case of Argan in Morocco, the initial driver was ensuring sustainable sourcing of Argan oil. This led to work with the Targanine cooperative on improving quality and empowering the women. The program was so innovative that new ingredients were developed based on Argan oil by-products, which led to monetary and non- monetary benefits. It did not begin as an ABS case but it ended up as such. In the case of quinoa husk extract, there were also both sustainable sourcing and ABS challenges. The importance of cooperating with suppliers and local authorities, as well as to have absolute transparency, to address these challenges is clear.

Thiago Terada, Sustainability Manager at Beraca, noted how the company is among those with the most ABS contracts in Brazil – 60 authorisations for scientific research and 40 for bioprospecting. Beraca's ABS work is framed in context of its socio-biodiversity enhancement program, which looks at both social and environmental issues. Officially-recognised ABS projects, including on Buriti, Tucuma and Andiroba, thus address issues from micro-deforestation to alternative incomes for the communities. Lessons learnt include the need for long-term relationships, to make projects meaningful to the communities, and to always include capacity-building elements.

Nadia Moutawakkil, speaking for the Moroccan-German Cooperation Project on the Nagoya Protocol, provided examples of ABS agreements recently signed on a voluntary basis in Morocco. These agreements show that it is possible to respect the Nagoya Protocol, even before a legislative framework is in place. The lack of legislative framework did imply the need to raise awareness among potential partners of ABS principles. The process also involved accompanying the negotiation process, elaborating an agreement on ABS and, very importantly, monitoring and evaluation. In the two cases presented, this approach allowed for a range of benefits, both monetary and non-monetary, to be agreed upon.

Source: UEBT

Natural & Organic Cosmetics Conference to Focus on Latest Market Growth Opportunities

The radar of the cosmetics markets clearly shows two favorites that couldn´t be any more different: natural and organic cosmetics and high-tech cosmetics are the relevant growth areas in the cosmetics market. The market is setting high standards. Primarily the new ambitious consumers are driving the market for natural and organic cosmetics forward. Amidst natural romance, self-staging and health issues, suppliers, retailers and newcomers are experiencing the challenge to consolidate their positioning. International experts, lateral thinkers and trade experts will discuss these topics during this year´s Natural & Organic Cosmetics Conference, which will be held September 27-28, 2016, at the Hotel Ellington Berlin.

Key updates to be given at the conference will include:

- Why natural cosmetics are the winners of digitalization
- Why health and natural and organic cosmetics are closing ranks
- Beauty 3.0 – how the concept of beauty is changing

- Consumer transparency – what can still be conveyed
- The segment of natural and organic cosmetics – how it may be expanded
- The pros and cons of palm oil in cosmetics
- New EU-framework regulations and TTIP and its effects

The conference will also provide a focus on the world´s largest natural and organic cosmetics market. Experts from the US will offer the latest data and provide insights about what needs to be observed stateside. Conference participants may also look forward to current market research results from relevant target groups.

The Natural & Organic Cosmetics Conference as a trade highlight in the fall is – next to the trade highlight VIVANESS in the spring – an important event for all market participants looking forward to discuss current challenges and trends of the cosmetics market with international experts and meeting members of industry and retail. Participants may look forward to an interesting, inspiring and future-oriented Conference. Participants are international decision makers of the entire beauty trade. Next to the Conference program, there will be ample opportunities for discussions and international networking.

The Natural & Organic Cosmetics Conference is targeted at management members and decision makers of the entire cosmetics and natural and organic cosmetics industry, marketing- and distribution managers, research and development managers, purchasing and procurement, service companies and manufacturers, development and production companies, suppliers and of course all retailers from the segment of drugstore and cosmetic retailing, pharmacies, health food stores, natural and organic cosmetics specialist stores, perfumeries, food retail as well as department stores, wholesalers and retailers, online stores and purchasing associations, service providers, agencies and associations from all over Europe.

About Natural & Organic Cosmetics Conference
The Natural Cosmetics Conference puts the focus on trade topics such as digitalization and the forward-looking scenarios for industry and retail, international trendscouting, the effects of changing beauty concepts as well as an expert discussion about consumer protection with representatives from politics, associations and retail.

Source: Natural & Organic Cosmetics Conference

Corporate Social Responsibility (CSR) continues to be given high profile

Pamela gill Alabaster has been appointed to lead the global corporate communications and corporate social responsibility by Revlon Inc. Alabaster, who was previously with Estée Lauder will be responsible for managing global internal and external communic-ations and public affairs. She will also oversee corporate social responsibility, aligning goals with the company's long-term business strategy. Alabaster will report to Fabian Garcia, Revlon's president and CEO. Garcia stated, "As we continue to execute our strategy which ensures that Revlon is the quintess-ential and most innovative beauty company in the world, Pam's depth of experience in strategic communic-ations and CSR will be an important asset. Pam's insight and proven ability to successfully build strategic collabor-ations will contribute greatly to our global strategy and help us reach the highest standards that our consumers, employees, shareholders, investors and other stakeholders expect from us."

Source: Revlon

Organic personal care industry forecast to grow strongly

The organic personal care industry, including cosmetics, is forecast to grow at a rate of 9.6%, reaching $13.2 billion by 2018, according to Transparency Market Research. By 2020, the market is expected to reach $15.98 billion, according to Grand View Research. Fragrance represents an emerging opportunity for beauty and personal care brands in this space. If it is important to you that the food you eat is organic and the products you put on your skin are organic, increasingly, chances are that the fragrances you select will also be organic and ecologically sound.

What exactly are organic fragrances? The term “organic” is defined differently by various certification and governmental organizations around the world. However, organic in general refers to the way ingredients are grown and processed, particularly the prohibition of synthetic fertilizers and pesticides, as well as synthetic processing aids. As a result, organic fragrances tend to be free of synthetic chemicals. Most importantly, organic differs from “natural” and “eco” in that only “organic” can be certified by governmental bodies such as the U.S. Department of Agriculture, thereby assuring clear standards and authenticity for consumers. In France, for example, the birthplace of modern perfumery, EcoCert (www.ecocert.com) is the principle certification body, and in fact, the very first organization to develop standards for organic products. The EcoCert standard, established in 2003, ensures the use of ingredients derived from renewable resources and manufactured using environmentally friendly processes. EcoCert also ensures the absence of GMOs, parabens, phenoxye-thanol, silicon, synthetic perfumes and dyes, and animal-derived ingredients (unless naturally produced by them, for example milk and honey). The certification also vouches for the biodegradable or recyclable nature of packaging, and that a minimum threshold (95%) of natural ingredients stem from organic farming. Today, a number of French organic brands are responding to the demand for organic products perceived as “good-for-you” with EcoCert labels.

Source: Trade press

Europe’s cosmetics and personal care industry strong and diverse

Europe’s cosmetics and personal care market is a major driver for natural raw materials production. Five hundred million European consumers use cosmetics and personal care products, according to data presented during cosmetics Europe Week in Brussels, which took place June 13–17. Yet challenges remain. The European industry’s export market totaled 17.2 billion euros in 2015, according to the research, with France and Germany holding 53% of the total global exports. The sales supported more than 2 million cosmetics industry jobs, 56% of which are held by women and 44% of which are held by men. Both big and small companies are aiding Europe’s industry, which features 4,605 SMEs. The industry supports 26,000 scientists with a diverse range of scientific disciplines.

While trends like globalization help the cosmetics industry, major global trends like digitalization, individualization and resource consciousness help lead the European cosmetics industry toward a positively growing future. “Our industry remains strong and shows signs of growth despite trying economic circumst-ances,” said Loïc Armand, president of Cosmetics Europe. “Valued at 77 billion euros, Europe remains the largest market for cosmetic products in the world. But we should not be complacent. Business is global and to remain competitive in the global market place, we need a Europe that facilitates science and innovation.”

Source: Europe Week

PRODUCT & MARKET NOTES

Socio-economic important of essential oils

Social importance of essential oils – Eucalyptus globulus

Although the essential oils are considered 'minor' crops, their production and position in the economy can be locally very important in centres of production, being a major and important source of cash income to families involved in the supply chain – whether as producers, processors (distillers), or in the collection and marketing chain. And as products, they play a vital – essential – role in the flavours and fragrance industries, as well as important roles in the pharmaceutical and wider health sectors. Many essential oils have a long established position in Traditional Medicine, and the newer area of aromatherapy is based on their use. Industries that use these oils have a real concern that unless the social and economic importance of these crops and products is recognized, there is a real danger that their production will not be given support, and production will decline, with land given over to other crops, and the industries will be left with no alternatives to synthetics. These are wonderful natural products, that play an important role in local economies and in the final consumer products in which they are used, and meet the needs of the market for 'natural' and 'green' labels. IFEAT (International Federation for Essential Oils and Aroma Trades), the major global trade body for the flavours and fragrances sector, is commissioning a range of Product Profiles to highlight the socio-economic importance of some of the key essential oils, to help ensure that the importance of these crops and products are recognized by decision makers. The profile below is based on work prepared and published by IFEAT.

Eucalyptus globulus

Eucalyptus globulus is one of the most commonly used essential oils, widely used in food flavouring – sweets and chewing gum are commonly flavoured with it. In fragrance compounds, it is widely used in toothpastes, mouth-washes, and other toiletries for its refreshing impact and sense of cleanliness, and in household cleaning products. It is also used in fine fragrance for the same reasons. In the medical/pharmaceutical areas it is used as an anti-microbial agent, and as a common and effective ingredient in nasal and sinus sprays, cough sweets, ointments and chest rubs. In aromatherapy it is used for its invigorating properties, as a skin anti-inflammatory agent, and as a pain killer for rheumatic ailments. It is also used for massage, in healing spa baths, and for sports massage (for muscle fatigue).

China is the dominant supplier to the world market, producing around 17,000 tonnes, of which around 10,000 tonnes is exported. The crude oil contains 45-52& eucalyptol. The traditional production area is in Yunnan, in the west and south.

The oil is distilled from the leaves of the tree. Trees are either planted specifically for the production of oil from the leaves, or are planted for their timber, and the leaves harvested as a by-product. In both ways the crop contributes to maintaining tree cover and counters erosion. It is estimated that the total area of plantation is around 4.6 million hectares – a very substantial forest area. When grown for timber, the primary use is in construction, and as roof supports in underground mines. For both, the crop rotation time is short – around 5 years. To stimulate growth, the foliage is trimmed, and this provides the leaf material for distillation – providing an income before the trees are ready for harvest.

Leaf harvest and distillation season varies by production area, but all areas taken together provide all year round production. Differences in land ownership result in differences in the structure of the industry. In some areas, farmers have their own tree plantings, or purchase leaves from other farmers who have trees, and distill the leaves in their own simple stills. In other areas, farmers lease land planted with eucalyptus trees from the local government, and hire labourers to collect the leaves for distillation. Overall it is estimated that around 500,000 people are engaged in the eucalyptus globulus industry in China.

The crude oil can be fractionated to increase the % eucalyptol content – typically to 80%, or any other specification required by the client.

Characteristics and Standards

Eucalyptus oils are classed as either medicinal, industrial, or perfumery. *E. globulus* is classed as a medicinal oil (as opposed to 'Industrial Oils', for example from *E. dives*; and 'Perfumery Oils', for example *E. citriodora*).

Guenther gives the essential characteristic of E globulus as having 70% to 80% cineole. (The principal constituents of an *E. dives* industrial type oil are piperitone and phellandrene; the principal constituent of an *E. citriodora* perfumery oil is citronellal.)

Oil yield of terminal branchlets and leaves is typically in the range 0.75 to 1.2%. Other species of medicinal eucalypts can give over 2% oil yield, and higher levels of cineole, which has led to a replacement of *E. globulus* as the primary source species in some areas. The highest yield of oil comes from the top leaves, and these also have a higher cineole content. A tree 6 to 8 yrs old can yield in the range 20 to 60 kgs of leaves for distillation. Distillation requires around 6 hours (including the time for charging).

Physiochemcal properties: (typical values for a Spanish oil)
Specific gravity at 15^o: 0.9175 to 0.930
Optical rotation at 20^{o}C: +2^o 0' to +7^o 12'
Cineole content: 66.5 to 73.3%
Solubility in 70% alcohol: soluble in 2.2 to 11 vols., frequently with separation of paraffins

Rectified oil (to increase the cineole content):
Specific gravity at 15^o: 0.905 to 0.922
Optical rotation at 20^{o}C: +1^o 48' to +9^o 0'
Cineole content: 71.3 to 84.5%
Solubility in 70% alcohol: soluble in 1.5 to 10 vols.

AFNOR standard NF T 75-225 (March 1982)

Aspect: Limpid
Colour: clear to yellow
Odour: characteristic, cineole

Density at 20^{o}C: 0.906 to 0.925
Refractive index at 20^{o}C: 1.4590 to 1.4670
Optical rotation at 20^{o}C: between 0^o and 10^o

Solubility in 70% alcohol at 20^{o}C: less than 5 vols.

Cineole-1-8 content: minimum 70%

PRICE INFORMATION

Conventional oils

PLEASE REMEMBER THAT THESE ARE ONLY PRICE INDICATIONS.

Price indications collected from the markets are given for a range of essential oils, below. The oils are grouped *for convenience only* into Spice Oils, Seed Oils, Citrus Oils, Herb Oils and Perfumery Oils. Prices are wholesale for quantities of 25kg or more unless otherwise stated.

Spice Oils

Product	Origin/Grade	Prices per KG (US$)
Clove bud	Indonesian	$23/kg 1 tonne lots
	Indian	$84/kg 1 kg lots
	Madagascan	$75/kg 1 kg lots
Clove stem	Indonesian	$15/kg container
	India	$50/kg
	Madagascar	$36/kg 200 kg lots
Clove leaf	Indonesian min. 73%	$12.00/kg, container
	Indonesian min. 80%	$13.50/kg
	Indonesian min. 82%	$14.00/kg
	Madagascan	$17/kg
	Indonesian	$46/kg
	Indonesia	$18/kg container
Cinnamon bark	Sri Lankan 60/65%	n/a
Cinnamon leaf	Sri Lankan	$70/kg 1 kg lots
	India	$30/kg
Cassia bark	China	$35/kg; $70 1 kg lots
Black pepper	Sri Lankan	$218/kg 1 kg lots
	Indian	$125/kg; $195 1 kg lots
Nutmeg	Indonesian (myristicin 7%)	$48/kg
	Indonesian (myristin 8%)	$50/kg
	Indonesian (myristin 10%)	$60/kg
	Indonesian(myristicin 2%)	$43/kg
	Indonesian (safrole free)	$78/kg
Ginger	Chinese	$105/kg
	Indonesia	$97/kg
	Indian	$80/kg
	Indonesia (red)	$98/kg
Pimento leaf	Jamaican	$140/kg
	Jamaican	$90 container
Pimento berry	Jamaican	€210/kg
	Jamaican	$154 1 tonne lots
Cardamom	Guatemala	$200/kg container $210/kg spot

Spice Seed Oils

Product	Origin/Grade	Prices per KG
Aniseed	China	$13-16 CIF NW Europe; $75/kg 1 kg lots
	India	$25/kg
Star Anise	India	$120/kg
Coriander seed	Russian	$80/kg
Coriander herb	Egypt	$140/kg drum
Cumin seed	Egypt	$95; $285/kg 1 kg lots

Citrus Oils

Product	Origin/Grade	Prices per KG
Orange (sweet)	Brazilian	$10/kg; $30/kg 1 kg lots
	Italy (b/orange c/pressed)	$33/kg
	Brazil (pera)	$9/kg container
Orange (bitter)	Italian (c/pressed)	$62/kg
Bergamot oil	Ivory Coast/Italy	$80/kg; $135/kg 1 kg lots
Lemon	Italian	$58/kg 1 kg lots
	Italian (c/pressed)	$35
	Argentina	$30/kg container
	Brazil	$30/kg
Lime (distilled)	Italian	n/a
	Mexico/Peru	$37/kg container; $62/kg
Lime (cold pressed)		$25/kg
Mandarin (green)	Italy	$40/kg
Grapefruit (pink)	Argentina	$42/kg; $50/kg 1 kg lots
Grapefruit (white)	USA	$60/kg

Herb Oils

Product	Origin/Grade	Prices per KG
Basil	Comores	$125/kg
	Egypt	$82/kg; $150/kg 1 kg lots
	Vietnam	$90/kg
	India, ex-Chavicol	15/kg
Lavender	Bulgaria	$75/kg
	French	$250/kg
	English	$200/kg
	Russia	$95/kg drum
Lavendin	French Grosso	$35/kg
Spike Lavender	Spain	$130/kg
Mints	India piperita menthofuran 8%	$34/kg
	India, mentha arvensis crude, L-menthol 72%	$15/kg
Menthol	Indian, bold crystals	$18/kg
	Indian, medium crystals	$17/kg
	China	$18/kg
Menthol flakes	India; natural L-menthol	$17/kg

	98.5%	
Menthol flakes, melted	India; TMC 97%	$16/kg
Peppermint menthofuran 3%	China	$26.50/kg
Peppermint	China	$15/kg container
Peppermint dementholised	Indian	$13/kg
Menthone 80/20	Indian	$15/kg
Menthone 90/10	Indian	$16/kg
Spearmint	China 60% carvone	$23/kg
	India 55% carvone	$20/kg
	India 60% carvone	$21/kg
Chamomile (German)	German blue	$670/kg
	Morocco (wild)	$450/kg
	Egypt (blue)	$1,200/kg
Chamomile (Roman)	UK	$1000/kg
Sage	Croatia	$130/kg
Rosemary	Portugal/Spain/Tunisia	$55
	Spain	$68/kg drum
	France	$78
Marjoram	Spain (wild)	$210/kg 1 kg lots
Thyme	Spain	$67/kg; $85 1 kg lots

Perfumery Oils

Product	Origin/Grade	Prices per KG
Eucalyptus globulus & other high cineole types	China	$15/kg container; $35/kg 1 kg lots
	Australian	$44/kg
	India, 85%	$18/kg
	India, 60%	$16/kg
	China	$38/kg 1kg lots
	Madagascar	$31/kg
Eucalyptus citriodora	China	$49/kg 1 kg lots
	Madagascar	$25/kg
Litsea cubeba	Spain	$22/kg
	China	$21/kg container
Ylang ylang	Comores: Extra S	n/a
	Comores : Première	$225/kg
	Comores : Deuxième	$180/kg
	Comores : Troisième	$95/kg
	Comores: Complet	$150/kg 1 kg lots
	Madagascar (grade II)	$80/kg
Ylang (cananga)	Indonesia	$61/kg 1 ton lots
Patchouli - Indonesia	Sulawesi min 26% pa	$44/kg
	Sulawesi min 30% pa	$46/kg
	Sulawesi min 30% pa, light	$49/kg
	Sumatra min 30% pa	$52/kg
	Sumatra min 32% pa	$55/kg
	Sumatra min 34% pa	$62/kg
	Sumatra min 30% pa, light	$55/kg
Rose	Bulgaria	$10,000/kg
Geranium	Egypt	$140/kg
	Egypt	$166/kg
	China	$165/kg

	Madagascar	$310/kg
Rose Geranium	Madagascar/France	$225/kg
Niaouli (Cineole 1,8) (Malaleuca quinquenervia type I)	Madagascar	$16/kg; $60/kg 1 kg lots
Niaouli Viridiflora (Malaleuca viridiflora type II)	Madagascar	$20/kg
Petitgrain	Paraguay	$58/kg drum; $98/kg 1 kg lots
Sandalwood	India	$2,900/kg
	East Indies	$2,500/kg
	Australian	$1,600-2,000/kg
Cedarwood	USA	$52/kg
	China	$13/kg container; $50/kg 1 kg lots
Frankincense	Somalia/France	$270/kg
Citronella	Chinese	$18/kg container; $23/kg; $53 1 kg lots
	Sri Lanka	$40/kg container
	Indonesia	$16/kg
	Indian 80%	$17/kg
Lemongrass	Indian	$20/kg container; $37/kg 1 kg lots
	Madagascar (C. giganteus)	$55/kg
Palmarosa	Indian	$25/kg; $130/kg 1 kg lots
Vetiver	Indonesian	$240/kg; $380/kg 1 kg lots
	Indonesian	$260 rectified
	Indonesian, molecular dist.	$260/kg
Tea Tree	Australia	$48/kg; $90/kg 1 kg lots
	Australia, lemon scented	$140/kg
Guaiacwood	Paraguay	$25/kg drum
Fennel, bitter	Spain	$97/kg
Juniperberry	India	$120/kg; $260/kg 1 kg lots
Myrrh	India (extract)	$133/kg
	India (distilled)	$270/kg; $395/kg 1 kg lots

PRICE INFORMATION

Organic essential oils

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Spice Oils

Product	Origin/Grade	Prices per KG (US$)
Clove bud	Indian	$150/kg
Clove leaf	Indian	$75/kg
Cinnamon bark	Sri Lankan	$420/kg
Cinnamon leaf	Sri Lankan	$110/kg
Nutmeg	Indonesian	$172/kg
Ginger		$270/kg
	India	$170/kg drum

Spice Seed Oils

Product	Origin/Grade	Prices per KG
Star Anise	China	$180/kg
Cumin seed	Egypt	$90/kg

Citrus Oils

Product	Origin/Grade	Prices per KG
Orange (sweet)	Italian (c/pressed)	$36/kg
Orange (bitter)	Italian (c/pressed)	$135/kg
Bergamot	Italy (c/pressed)	$195/kg
Lemon	Italian (c/pressed)	$60/kg
	Italian (c/pressed)	$71/kg
	Argentina	$75
Mandarin (red)	Italy	$225/kg
Mandarin (green)	Italy	$187/kg
Clementine	Italy	$120/kg
Petitgrain (C. aurantium)	Paraguay	$110/kg

Herb Oils

Product	Origin/Grade	Prices per KG
Basil	Egypt	$187/kg
	India	n/a
Lavender	France	$210/kg
Lavendin	French Grosso	$55/kg
Mint, peppermint	USA	$90/kg
	India	$65/kg drum
Mint, Cornmint	India, mentha arvensis	$52/kg
Mint, spearmint, M. spicata	USA	$112/kg
Chamomile (German)	Nepal	$780/kg
	India	$1,250/kg
Chamomile (Roman)	Hungary	$1,500/kg
Sage	Croatia	$240/kg
Rosemary	Spain	$42/kg
	Tunisia	$25/kg
Marjoram	Spain	$330/kg
Thyme	Hungary	$300/kg
	India	$65/kg
Fennel	India	130/kg

Perfumery Oils

Product	Origin/Grade	Prices per KG
Eucalyptus radiata & other high cineole types	China	$64/kg
E. globulus	India	$45/kg (60%)
	India	$50/kg (80%)
E. polybractea	Australian	$135/kg
E. smithii	South Africa	$75/kg
Eucalyptus citriodora	Brazil	$52/kg
	India	46/kg
Litsea cubeba	Spain	$35/kg
Ylang ylang	Comores: I	$225/kg
	Comores : II	$180/kg
	Comores : III	$210/kg
	Comores: Complet	$330/kg
Patchouli	Indonesia	$175/kg;
Geranium	Egypt	$375/kg 1 kg lots
Sandalwood	Sri Lanka	$1,950/kg 1 kg lots
Cedarwood	USA	$63/kg
Naouli		$97/kg
Ravinsara	Madagascar	$275/kg 10 kg lots
Frankincense	Somalia/France	$525/kg 1 kg lots
	India (B. serrata)	$78/kg drum
Pine (P. silvestris)	Hungary	$190/kg
Citronella	Sri Lanka	$100/kg
	India	$63/kg
Lemongrass	Nepal	$75/kg
Palmarosa		$80/kg
	India	$70/kg
Vetiver	Indonesian	$450/kg 1 kg lots
	Indian	$350/kg
Tea Tree	Australia	$90/kg;
	Australia, lemon scented	$225/kg

Fennel, sweet	Bulgaria	$150/kg
Juniperberry	India	$225/kg
Myrrh	Africa	$1,800/kg

Suppliers of Equipment

Suppliers to the African market

The distillation and extraction industry in Africa is relatively small and localised outside of the North African centers of Egypt and Morocco, and Southern Africa (South Africa, Swaziland). New entrants to the industry can find it hard to identify suppliers of equipment (stills, condensers, extractor vessels etc) in stainless steel, steam boilers, and other necessary materials (drums, jugs, filter papers etc).

The development of the industry in Africa would benefit greatly if there was greater sharing of information on the location of suppliers. New entrants would find it easier to identify necessary suppliers, and the concentration of orders on particular suppliers would encourage the development of skills and expertise – this is particularly necessary in the areas of fabrication of stainless steel vessels and condensers.

Some contacts of companies involved in the manufacture of distillation/extraction equipment or the capability to do so (primarily the capability to work with stainless steel) or supply of materials based in East Africa are given below.

The Newsletter would welcome information from Readers on other suppliers of relevant equipment and materials from all regions of Africa, so that the listing can be expanded.
Please send any information to marketinsider@intracen.org

The contacts are provided as a service only. NO RECOMMENDATION IS IMPLIED.

1. MANUFACTURE OF STAINLESS STEEL DISTILLATION EQUIPMENT:

KENYA:

ASL – Heavy Fabrication Division
Ramco Industrial Park
Mombassa Road
PO Box 18639-00500
Nairobi. Kenya
Tel: +254 20 821567/820296/820394
Fax: +254 20 820169/651893
bm@heavyfab.co.ke
Attn: Mr Ve Balamurali, General Manager

Warren Enterprises Ltd
PO Box 8251
Nairobi. Kenya
Tel: +254 20 8561 932/3/4
Fax: +254 20 8561 013
Attn: Mr S Ramaswamy, Managing Director

Morris Steel & Company
Mogadishu Road
PO Box 18310
Nairobi. Kenya

Tel: +254 20 533 627
Attn: General Manager

UGANDA:

Specialised Welding Services (previously Kasise Kleinsmedie Uganda Ltd)
Jinja Road, Plot 96
PO Box 40115
Nakawa Vocational Training Center
Kampala
Uganda
Tel: +256 (776) 405060/405070/405080
+256 (772) 227 003 (Samantha Moray)
sam.moray@sws.co.ug
Attn: Samantha Moray, General Manager
www.sws.co.ug

MADAGASCAR:

Societe Aris Trading
Lot VB 81X Ambatoroka
101-Antananarivo. Madagascar
Tel: +261 20 24 264 96
Fax: +261 20 22 290 24
aristrading@freenet.mg
Attn: Mr James Davidson

ATICOM
Lot IT 91A Itaosy
102 Antananarivo – Atsimondrano. Madagascar
Tel: +261 32 07 744 34
morasatajosoa@yahoo.fr
Attn: Josoa Andriamorasata

SOUTH AFRICA:

EDESA (Essential Distillation Equipment)
PO Box 123
Riebeek Kasteel 7306
Western Cape. South Africa
Tel: +27 (82) 334 3324
fax: 0866 088508
info@edesa.co.za
werner.ede@vodamail.co.za
www.edesa.co.za
www.stillpure.co.za
Skype: werner.bester2
Attn: Werner Bester
Manufacture of distillation equipment and sales of used equipment.

BENCO PLANT & ENGINEERING (PTY) Ltd
159 Van Eeden Crescent, Rosslyn, Karin Park
P O Box 59. Pretoria, Gauteng. South Africa
Tel: +27 (12) 541-0398
Fax: +27 (12) 541-0399
Attn: Sloam Durbach
Manufacturer of distillation equipment and steam boilers

POWERSAVE

PO Box 699
Hilton 3245. South Africa
Tel (cell): +27 82 493 8670
Fax: +27 33 34 33 755
Attn: Greg Rowe
gregrowe@telcomsa.net
Manufacture of steam distillation plants

Henry S Komar & Associates CC
2 Hebel Road, Roodepoort, Gauteng, South Africa
Postal address: PO Box 994, Honeydew 2040, South Africa
Tel: +27 11 760 2718
Fax: +27 11 760 1079
Attn: Stan Kumar, CEO
info@komar.co.za; sales@komar.co.za
www.komar.co.za

Manufacture of stainless steel distillation and processing equipment. Also sales of secondhand equipment.

THE PROCESS TEAM CC
37 Nelson Road, Amanzimtoti
Kwa-Zulu Natal 4126. South Africa
Attn: Peter Myburg

Design and manufacture of stainless steel distillation equipment.

2. SUPPLIERS OF STEAM BOILERS

MADAGASCAR:

ARTICOM
Lot IT 91A Itaosy
102 Antananarivo – Atsimondrano. Madagascar
Tel: +261 32 07 744 34
morasatajosoa@yahoo.fr
Attn: Josoa Andriamorasata

ARTICOM make a simple, low pressure, wood fired steam boiler.

KENYA:

Industrial Boiler Products Co. Ltd.
Kampala Road, Industrial Area
Nairobi, Kenya.
+254 733 700175
mail@industrialboilerproducts.co.ke
peter.fernandes@industrialboilerproducts.co.ke
Peter Fernandes
www.ibp.co.ke
Indian manufactured steam boilers; biomass fired.

Boiler Consortium Africa (BCA) Ltd
PO Box 60780. Nairobi. Kenya
Tel: +254 20 557837/ 536793/ 4349310
Tel: +254 722 750131/ 703511/
Fax: +254 20 735 331177
Barry Corlines

info@boilersafrica.com
www.boilersafrica.com

BCA design, manufacture and commission boilers, included wood fired steam boilers, and are agents for Riello in East Africa.

SOUTH AFRICA:

Combustion Technology South Africa
PO Box 30047. Tokai, 7966 Cape Town, South Africa
Tel: +27 21 715 3171
Fax: +27 21 715 6297
www.combustiontechnology.co.za

Combustion Technology are the exclusive Southern African distributors of Riello burners and Garioni Naval Boilers.

BENCO PLANT & ENGINEERING (PTY) Ltd
159 Van Eeden Crescent, Rosslyn, Karin Park
P O Box 59. Pretoria, Gauteng. South Africa
Tel: +27 (12) 541-0398
Fax: +27 (12) 541-0399
Attn: Sloam Durbach
Manufacturer of distillation equipment and steam boilers

CAPE BOILER
16 Natal Street, Parden Island, Cape Town, South Africa
Tel: +27 21 511 6652
Fax: +27 511 4415
Attn: Mr Nic Kellerman

INDIA:

Firetech Boilers Pvt Ltd
FIRETECH HOUSE, No.211, 2nd Cross, 38th Main,
B.T.M Layout, 2nd Stage, Bangalore 560 068. India
Tel: +91-80-6683686; Fax: +91-80-6683921
Email: firetech@vsnl.net
Manufacture of wood fired steam boilers. Indian manufacturer, but has supplied boilers to Africa.

AUSTRIA:

Binder GMBH
Mitterdorferstr. 5
8572 Barnbach
Austria
Email: office@binder-gmbh.at
Tel: +43 3142 22544-0
Fax: +43 3142 22544-16
www.binder-gmbh.at

Binder Agents in UK:
Wood Energy Ltd, Severn House, 1-4 Fountain Court, Bradley Stoke, Bristol. BS32 4LA
www.woodenergyltd.co.uk

Kohlbach Group
Grazer StraBe 23
A-9400 Wolfsberg
Austria

Email: office@kohlbach.at
Tel: +43 4352 2157-0
Fax: +43 4352 2157-290
www.kohlbach.at

USA:

Hurst Boiler & Welding Company, Inc.
100 Boilermaker Lane
Coolidge, GA 31738-0530
USA
Phone: +1 229-346-3545
Fax: +1 229-346-3874
Email: info@hurstboiler.com
www.hurstboiler.com

3. SUPPLIERS OF MATERIALS AND EQUIPMENT

(a) Forklift trucks/pallet trucks

Forktruck Solutions
16 Kiewiet Close, Okavango Park, Brackenfel 7560, Cape Town. South Africa
Postal address: PO Box 3221, Durbanville 7551. South Africa
Tel: +27 21 982 1142 and +27 21 981 2649;
Cell: +27 83 2848 557
Fax: +27 21 982 1141
Attn: Dirk van der Westhuizen
dirk@forktrucksolutions.co.za
www.forktrucksolutions.co.za

Sales and rental of new and used forklift trucks. Also pallet jacks/stackers and range of other warehouse equipment.

(b) Hoists and lifting equipment

Blue Cranes,
Crane House, 10 Mansell Road, Killarney Gardens, Minerton, Cape Town, South Africa
Postal address: PO Box 702, Melkbosstrand 7437. South Africa
Tel: +27 21 556 0498/9
Fax: +27 21 556 0486
Attn: Mr Kobus Steyn
joseph@bluecranes.co.za
www.bluecranes.co.za

Manufactures full range of hoists, beam girder cranes and lifting equipment. Sole supplier of Liftket electric chain hoists and wire rope hoist units. Repairs and spare parts supply service. Supply of associated slings, chains, blocks etc.

(c) Essential oil drums:
Greif supply a range of steel and coated drums, and are present in 45 countries around the world.

Greif Kenya Ltd
Box9036 - Unga Street
Shimanzi – Mombasa. Kenya
Tel: +254 41 2495591
Fax: +254 41 2494038

pascal.wanyonyi@greif.co.ke
Attn: Pascal Wanyonyi

Greif Nigeria Ltd
Apapa, Nigeria
Phone +234 (01) 587 0866
Fax +234 (01) 587 3084
vanleer@linkserve.com.ng
Attn: Olukunle Obadina,

Greif South Africa Ltd
Vanderbijlpark, South Africa
Phone +27 (0) 16 930 1100
Fax +27 (0) 16 930 1106
carl.williams@grief.com
Attn: Carl Williams
Website: www.greif.co.za

Greif Mozambique
Maputo. Mozambique
Phone +258 21 720153
Fax +258 21 720724
vanleer@vironn.com

Greif Egypt
Cairo, Egypt
Phone +20 2588 1110
Fax +20 2593 3889
E-mail: koracons@link.com.eg
Attn: Ayman Korra

Greif Algeria
Arzew, Algeria
Phone + 213 41473723 / + 213 41473724
Fax + 213 41473730
Mohamed.Gherbi@Greif.com
Attn: Mohamed Gherbi

China:

Guangzhou New Jinrong Coopery Co. Ltd.
No.7 Huancui xi road
Cuishanhu new district
Kaiping
Guangdong. China
Ms. Lucinda Lux
Tel：+86 159 14338971,+86 18620468156, 0750-2889978
Fax: +86 7502889978
Email: newjinrong@163.com; paul_chew@163.com
SKYPE: xpyllj74

India:

Al-Can Exports Pvt Ltd
Sheetal Industrial Estate, Kashimira Road,
Bhayander East District,
Thane 401 105
India.
Tel: +91 22 2819 3122

Fax: +91 22 2814 2477
Email: info@alcanexports.com
Large range of aluminium flasks and bottles.

France:

Tournaire SA
70, Route de la Paoute
Le Plan.
BP 71004
06131 Grasse Cedex
France
Tel: +33 493 09 34 34
Fax: +33 493 09 34 00
Email: tournaire@tournaire.fr
Tournaire do a very wide range of aluminium bottles.

(d) Secondhand/used equipment

Secondhand equipment, particularly stills and condensers, can represent very good value. Details are given for 2 companies which have experience of shipping worldwide, and sometimes have distillation equipment in stock.

Perry Process Equipment Ltd
Station Road
Aycliffe Business Park
Newton Aycliffe
County Durham. DL5 6EQ. UK
Phone: +44 1325 315111
Fax: +44 1325 301496
info@perryprocess.co.uk
Website: www.perryprocess.co.uk
Perry Process Equipment is the European headquarters of the Perry Group of companies, which has operations around the world and is one of the worlds largest dealers in secondhand process equipment.

Centriplant Ltd
Littlemead Industrial Estate
Alfold Road
Cranleigh
Surrey. GU6 8ND
UK
Phone: +44 (01483) 271507
Fax: +44 (01483) 278183
Contact: Mark Williams markw@centriplant.co.uk
Website: www.centriplant.co.uk
Centriplant has distillation plants on an occasional basis, but always have a range of stainless steel tanks, and bottling/packing lines that could also be of interest to producers.

EVENTS CALENDAR

Food Ingredients (Fi) & Health Ingredients (Hi) South America
23-25 August 2016. Sao Paulo, Brazil
www.figlobal.com/southamerica/

Vitafoods Asia
1-2 September 2016. AsiaWorld-Expo, Hong Kong
www.vitafoodsasia.com

IFEAT 2016 Conference
25-29 September 2016. Dubai.
www.ifeat.org

Natural & Organic Cosmetics Conference
27-28 September 2016. Berlin, Germany
www.naturkosmetik-branchenkongress.de/en/

In-Cosmetics Formulation Summit
19-20 October. London, UK
www.in-cosmeticssummit.com

Cosmoprof Asia-Hong Kong
15-18 November 2016. Hong Kong
www.cosmoprof-asia.com

Health Ingredients (Hi) Europe
29 November – 1 December 2016. Frankfurt, Germany
www.figlobal.com/hieurope/

Food Ingredients (Fi) Europe
29 November – 1 December 2016. Frankfurt, Germany
www.figlobal.com/hieurope/

SuluExpo 2016: 12th International Exhibition for Cosmetics, Beauty & Hair
8-10 December 2016. Astana, Kazakhstan
www.kazexpo.kz/eng/sulu/bw_eng.htm

Biobased World Tradeshow
15-16 February 2017. Cologne, Germany
www.boiobasedworld.de/en/home.html

Fi & Hi Russia
28-30 March 2017. Moscow, Russia
www.figlobal.com/russia/